

wichealth.org: Client Follow-Up



Webinar Tips

- Click on “mic and speakers” in the control panel to connect to audio using your computer.
- If you **do not have speakers on your computer**, use the call in number to connect.
- Mute your microphone when not speaking.
- To ask a question use the chat function or raise hand during question/answer sessions.

How does it work?

Promotion

**Lesson
Completion**

**Agency
Follow-Up**

- Verification
- Documentation
- Benefit Renewal
- Interactive Component

Verification

How do you know a lesson has been completed?



- Physical Certificate
- Emailed Certificate
- State System
- Client Search
- Phone Call
- Complete Lesson at Clinic

Methods and Tips

- Physical certificate

- Client comes in at convenience
- Client comes in at scheduled appointment
- Client comes in during designated pick-up day

- Emailed Certificate/Client Search

- Look up on demand
- Check email at desired frequency (daily, etc.)
 - File in individual charts/record in computer
 - File in wichealth folder for quick reference

- Phone Call

- Client calls at scheduled time
- Client calls upon completion of lesson
- Staff calls when certificate is received

Documentation

- **Document in computer**

- Enter lesson in nutrition education section
- Add client goal
- Create alert on record to indicate lesson completion for benefit pick up

- **File physical certificate in chart**

- **State system**

- Automatic update

Benefit Renewal

•Pick-Up

- At convenience
- During scheduled appointment
- On designated pick-up day for wichealth.org

•Mailed

- Phone call

•EBT card

- Phone call
- Update when lesson shows up in system

Interactive Component

- Follow-up questions/discussion
 - Document summary of discussion in notes section
- Offer option for client to meet with nutritionist

Scenarios

Phone call + Client Search > Documented in Computer > Questions asked during phone call > Benefits mailed

- At the certification appointment, the client selected wichealth.org for her next secondary education. She is put on the schedule to call the clinic at a specified date and time, and given an appointment reminder card. Eight weeks later, the client has completed her lesson and calls at the scheduled time. During the call, the staff member uses Client Search to locate the completed lesson. The client is asked a few questions about the lesson and follows up with the behavior intent stated on the certificate. The lesson is updated in the computer. The nutritionist mails the benefits to the client.

Scenarios

Emailed certificate > Filed in chart > Benefits renewed during wichealth.org pick up day > Follow-up at next appt

- At the certification appointment, the client selected wichealth.org for her next secondary education. The staff member instructs her to complete a lesson over the next few months, email the certificate, come into the clinic between 8-5 on a Friday (their wichealth.org pick up day). The client is also reminded to make sure to complete the lesson at least 2 days before. Six weeks later the client completes the lesson. At this clinic, a staff member checks the email daily and files the certificates in a single folder designated for pick-ups. The client comes in that next Friday. A staff member finds the certificate in the folder, renews her benefits, and files the certificate in the chart. At the next appointment the nutritionist will talk with the client about the lesson she completed.

Tips

- Determine the best approach for your agency
- Talk with other agencies
- Develop a follow-up procedure document for your agency
- Provide follow-up information to client at promotion

Questions?

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